



OPERATIONS SUPPORT SERVICES DIVISION

P.O. Box 942702
Sacramento, CA 94229-2702
Telecommunications Device for the Deaf - (916) 795-3240
(916) 795-3020 , FAX (916) 795-3379

February 16, 2006

Sent: Via e-mail and overnight courier

TO: ALL QUALIFIED BUSINESS PARTNERS

FROM: CALIFORNIA PUBLIC EMPLOYEES' RETIREMENT SYSTEM

SUBJECT: ADDENDUM NO. 6
REQUEST FOR PROPOSAL NO. 2004-3494
COMET – PENSION SYSTEM RESUMPTION PROJECT

Addendum Number 6 shall be incorporated into the Request for Proposal (RFP) documents. The following revisions have been made to the RFP:

Section	Revised Language
II.B.1	Revised to read as follows: The evaluation of proposals and the award of any resultant contract shall be made in conformance with the procedures established in this RFP.
II.B.13	Subparagraph c is revised to read as follows: In the event of a protest, CalPERS may enter into a contract pending the outcome of said protest.
II.C.16	Revised to read as follows: QBP's that wish to continue participating in this solicitation process must submit the Notice of Intent to Bid, Attachment II.1, certifying their acceptance of the CalPERS Contract Terms and Conditions, Exhibit II.4.B, and indicating any provision(s) at issue by the date and time specified in the Schedule of Events.
II.D.2.b	Revised to read as follows: Exhibit II.4.B will be revised to reflect the final CalPERS Contract Terms and Conditions and will be issued by the date specified in the Schedule of Events.
V.B.8	Proposal Item 9 – was revised in its entirety.

Section	Revised Language
V.E.1	<p>Proposal Item 35 was revised to read as follows:</p> <p>All QBP's must complete and return Attachment V.6, QBP Staffing Plan. Attachment V.6 must list all proposed QBP resources assigned to this project. The resources must be grouped according to categories (executive, functional, technical, etc.), and separated into: <u>1) One-time Implementation and Deployment, 2) Ongoing Maintenance and Support; and 3) Future Staffing for unanticipated tasks.</u> <u>(Project Management, Functional Management, Technical Management, etc.)</u></p> <p>The QBP must identify the specific role to which each of the resources will be assigned, the pay classification for staff serving in that role, and the number of full-time equivalent (FTE) resources serving in that role per month. For roles at the Team Lead level and higher, identify the individual(s) who are proposed to fill that role and include their full resumes (Proposal Item 38). Identify the fiscal years, phases, and FTEs for the entire project duration, from start up through CalPERS acceptance and full implementation.</p> <p>For space planning purposes, CalPERS needs to know the actual number of QBP staff (not FTEs) that will be on-site during the project. Include at the end of each table the total number of QBP staff that will be on-site each month. Add lines as needed to the table.</p>
V.E.2	This section was replaced in its entirety to add narrative language and revise Proposal Item 40.
V.F.	This section was replaced in its entirety.
VII.B	<p>Last paragraph is revised as follows:</p> <p>For Phases 5 through 10, there is no implied order of implementation. There is a <u>unilateral</u> off-ramp at the end of Phases 1, <u>Initiation, that can be executed by either the QBP or CalPERS. Subsequent off-ramps are executed at CalPERS option only</u> 4 and after implementation of Contracts, Enrollment, and Contribution Reporting Business Components.</p>
VII.B	All tables in this section after the Payment Milestone Flow Chart were replaced in their entirety to reflect revisions to Rider I.
VII.E	This section was replaced in its entirety.
VII.F	<p>This section was revised to:</p> <ul style="list-style-type: none"> • Delete Cost Table VII.6; • Delete Cost Table VII.10; and, • Revise Cost Table VII.11 to reflect these revisions.
VIII.C	<p>Section VIII.C was replaced in its entirety to:</p> <ul style="list-style-type: none"> • Increase the number of copies; and, • Revise submission instructions regarding Master and Reproduction Copies.
VIII.E	<p>Volume III – Cost Data. Title was revised to read as follows:</p> <p>Volume III – Cost Proposal</p>
IX.E.6.	Replaced in its entirety.
IX.E.7.	Replaced in its entirety.

Section	Revised Language																																																																		
Attachment V.6	This document was replaced in its entirety to reflect revisions to Proposal Item 35.																																																																		
Attachment V.10	This document was replaced in its entirety to reflect revisions to Proposal Item 40.																																																																		
Cost Table VII.6	Cost Table VII.6 has been deleted.																																																																		
Cost Table VII.10	Cost Table VII.10 has been deleted.																																																																		
Cost Table VII.11	Cost Table VII.11 was revised to reflect deletion of Cost Tables VII.6 and VII.10.																																																																		
Exhibit II.4.B	No revisions were released in this addendum; however CalPERS is continuing to review proposed contract modifications submitted by the QBPs.																																																																		
Exhibit II.B.C, Rider A	Rider A was replaced in its entirety.																																																																		
Exhibit V.1	New exhibit added to reflect revisions to Proposal Item 40.																																																																		
Exhibit VI.1	Business Requirement 29 was revised as follows: The proposed solution must provide the ability to maintain associations of plan provisions to participants.																																																																		
Exhibit VI.1	Business Requirement 17 was revised as follows: The proposed solution must provide the ability to maintain plan provisions.																																																																		
Exhibit VI.1	Business Requirement 15 was revised as follows: The proposed solution must provide the ability to maintain plan provisions in mass.																																																																		
Exhibit VI.2	Key Business Rules – Revised to show that the following business rules are applicable only to the Health program: <table><tr><td>BR-9</td><td>BR-71</td><td>BR-128</td><td>BR-206</td><td>BR-930</td><td>BR-953</td></tr><tr><td>BR-10</td><td>BR-72</td><td>BR-129</td><td>BR-209</td><td>BR-931</td><td>BR-954</td></tr><tr><td>BR-18</td><td>BR-73</td><td>BR-130</td><td>BR-216</td><td>BR-932</td><td>BR-955</td></tr><tr><td>BR-20</td><td>BR-88</td><td>BR-131</td><td>BR-217</td><td>BR-934</td><td>BR-956</td></tr><tr><td>BR-25</td><td>BR-92</td><td>BR-134</td><td>BR-218</td><td>BR-935</td><td>BR-957</td></tr><tr><td>BR-26</td><td>BR-99</td><td>BR-161</td><td>BR-219</td><td>BR-936</td><td></td></tr><tr><td>BR-37</td><td>BR-103</td><td>BR-168</td><td>BR-220</td><td>BR-937</td><td></td></tr><tr><td>BR-39</td><td>BR-106</td><td>BR-189</td><td>BR-221</td><td>BR-940</td><td></td></tr><tr><td>BR-40</td><td>BR-107</td><td>BR-193</td><td>BR-222</td><td>BR-941</td><td></td></tr><tr><td>BR-42</td><td>BR-108</td><td>BR-204</td><td>BR-903</td><td>BR-951</td><td></td></tr><tr><td>BR-43</td><td>BR-123</td><td>BR-205</td><td>BR-928</td><td>BR-952</td><td></td></tr></table>	BR-9	BR-71	BR-128	BR-206	BR-930	BR-953	BR-10	BR-72	BR-129	BR-209	BR-931	BR-954	BR-18	BR-73	BR-130	BR-216	BR-932	BR-955	BR-20	BR-88	BR-131	BR-217	BR-934	BR-956	BR-25	BR-92	BR-134	BR-218	BR-935	BR-957	BR-26	BR-99	BR-161	BR-219	BR-936		BR-37	BR-103	BR-168	BR-220	BR-937		BR-39	BR-106	BR-189	BR-221	BR-940		BR-40	BR-107	BR-193	BR-222	BR-941		BR-42	BR-108	BR-204	BR-903	BR-951		BR-43	BR-123	BR-205	BR-928	BR-952	
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Exhibit VI.2	Key Business Rule 15 was revised as follows: Allow a set of plan provisions to be associated with a collective bargaining unit.																																																																		

Section	Revised Language
Exhibit VI.2	Key Business Rule 21 was revised as follows: Prevent a contract from becoming active until the participant group of participants and plan provisions have been associated.
Exhibit VI.2	Key Business Rule 29 was revised as follows: Allow multiple active medical health contracts for the same organization.
Exhibit VI.2	Key Business Rule 51 was revised as follows: Prevent State and California State University medical groups of participants from having the same collective bargaining unit.
Exhibit VI.2	Key Business Rule 63 was revised as follows: Prevent a new plan -provision from being associated to a contract with an effective date earlier than the current plan -provision effective date.
Exhibit VI.2	Key Business Rule 65 was revised as follows: Allow multiple active plan provisions to be associated to groups of participants.
Exhibit VI.2	Key Business Rule 67 was revised as follows: Prevent participants from being associated to inactive plan provisions.
Exhibit VI.2	Key Business Rule 69 was revised as follows: Prevent the addition of duplicate provisions to a plan participant .
Exhibit VI.2	Key Business Rule 74 was revised as follows: Allow the association of a plan provision to a medical group.
Exhibit VI.2	Key Business Rule 75 was revised as follows: Allow more than one plan -provision to be associated to a medical group.
Exhibit VI.2	Key Business Rule 97 was revised as follows: Allow the association of a group vesting schedule to a plan -provision.
Exhibit VI.2	Key Business Rule 110 was revised as follows: Allow the association of a vesting schedule by group and plan provision.
Exhibit VI.2	Key Business Rule 127 was revised as follows: Prevent more than one spouse/domestic partner from being active for a Health participant at the same time.
Exhibit VI.2	Key Business Rule 156 was revised as follows: Allow a participant to be associated to different plan provisions and/or different rate plans when an employer's contract is amended.
Exhibit VI.2	Key Business Rule 228 was revised as follows: Reactivate Health coverage for State and California State University employees when a new appointment exists and when the prior appointment separation date is within thirty days of the new appointment.

Section	Revised Language
Exhibit VI.2	Key Business Rule 234 was revised as follows: Prevent the COBRA end date from being greater than the cancellation date of enrollment.
Exhibit VI.2	Key Business Rule 675 was revised as follows: Calculate a benefit using the benefit-package provision information from an employer contract.
Exhibit VI.2	Key Business Rule 714 was revised as follows: Prevent the benefit calculation from proceeding when the participant's earnings or pay-rate exceed the prescribed threshold.
Exhibit VI.2	Key Business Rule 715 was revised as follows: Determine that the thresholds established pertain to the appropriate provision contract-package .
Exhibit VI.2	Key Business Rule 893 was revised as follows: Allow for each employer/ contract-package to contract for a-its unique percentage of COLA for their annuitants.
Exhibit VI.2	Key Business Rule 894 was revised as follows: Allow for the storage of each COLA percentage by group of participants per employer/ contract package .
Exhibit VI.2	Key Business Rule 910 was revised as follows: Apply the correct percentage to a participant's benefit allowance based on the employer's contract. organization and- contract-package .
Exhibit VII.1	Exhibit deleted
Exhibit IX.1	Preliminary Review Sheet – Replaced in its entirety to reflect revisions to Section VIII.

The enclosed CD-ROM incorporates language changes made in previous Addenda and reflects revisions to the RFP language as listed above. We appreciate your interest in our Project and look forward to your continued participation in the procurement process.

Sincerely,

Original Signed By:

Charleen Maxwell
Contracts Administrator
Contracts Management Section

Enclosure: CD-ROM